Imaging by Case

Note: In order to add an image to a case, an assignment to the case is not needed. However, additional security is needed for the Imaging Search page.

If you have an assignment to the case:

1. From the desktop, go up to Create > Case Work or click the Case Work hot button 

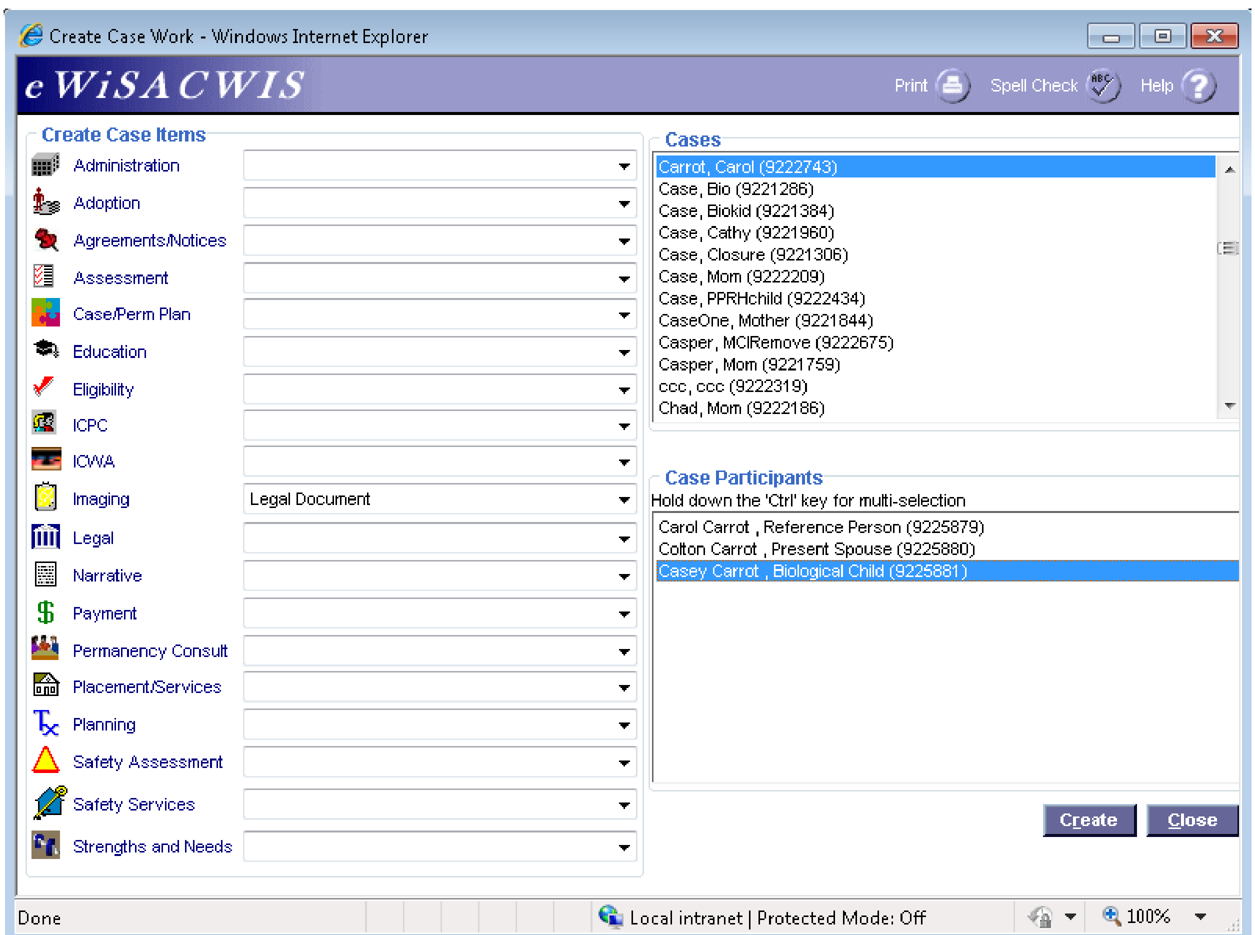
. This will open the Create Case Work page.

2. On the Create Case Work page, select the appropriate category from the Imaging drop-down for the type of imaging document you would like to upload. Please see the imaging memo for further details:

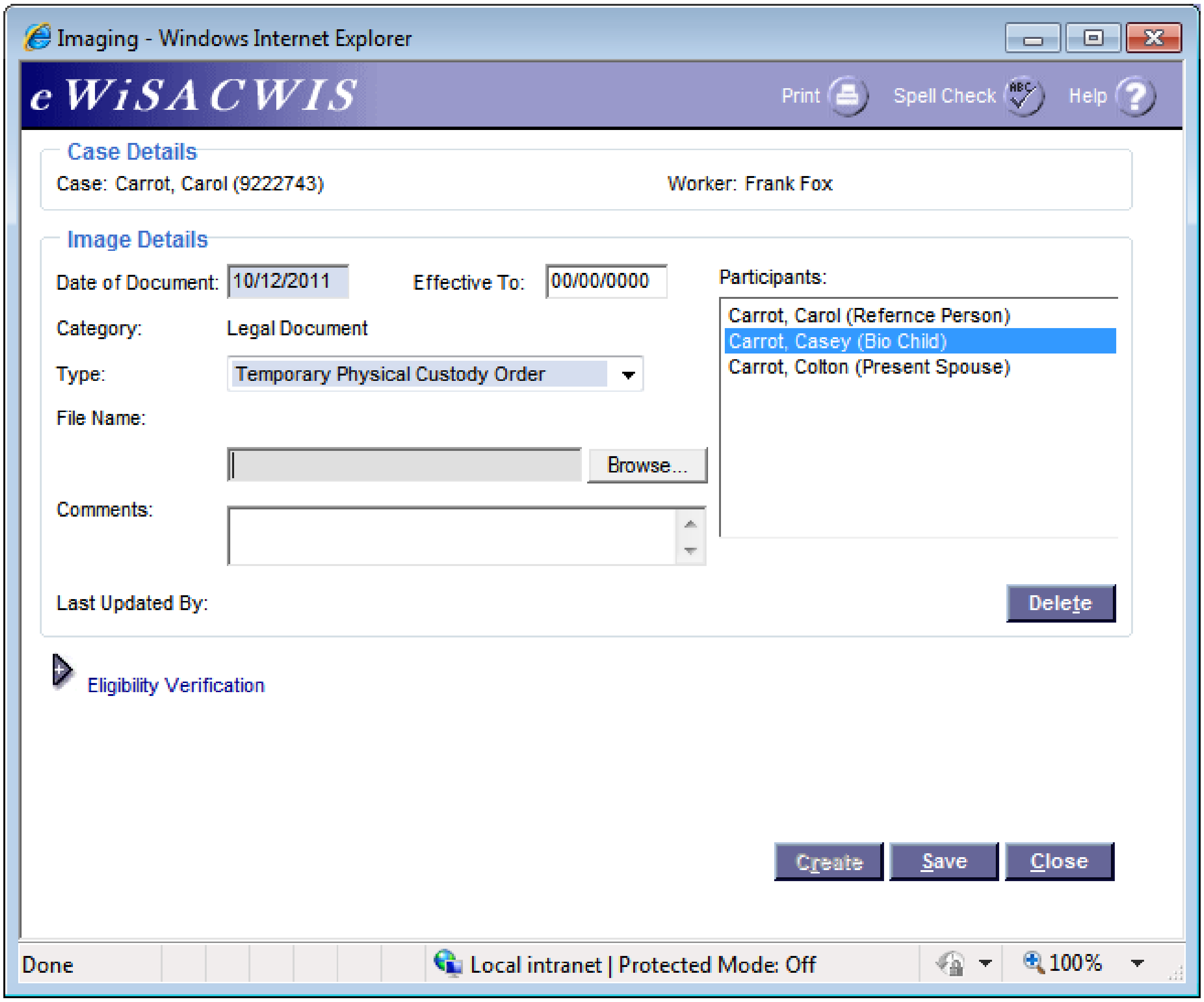
   http://dcf.wisconsin.gov/memos/num_memos/DSP/2010/2010-10.pdf

3. Select the Case and the Case Participant that the image is for. If the image is for multiple participants, select your participants by holding the control (ctrl) button while clicking on the participant's name.

4. Click on the Create button. This will open the Imaging page.



5. On the Imaging page, enter the Date of Document and an Effective To date, if applicable.

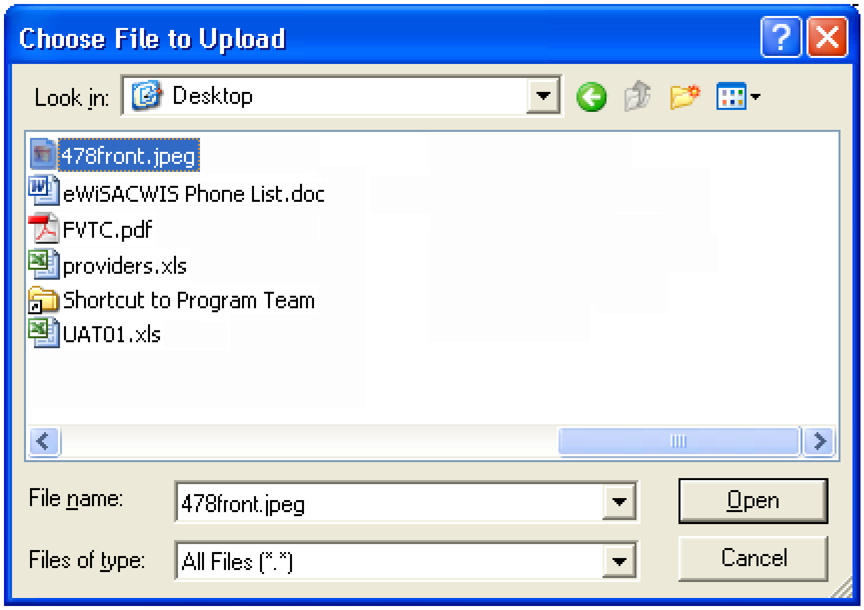


6. Select the type of document from the Type drop-down. Each category has a different list of types. If your document is not listed, select the ‘Other’ option. For example, ‘Other-Court Order’ or ‘Other-Participant Document.’

7. If you have not already done so, select the participant you would like the document attached to. Again, you can multi-select participants by holding the control (ctrl) button while clicking on the name, if applicable.

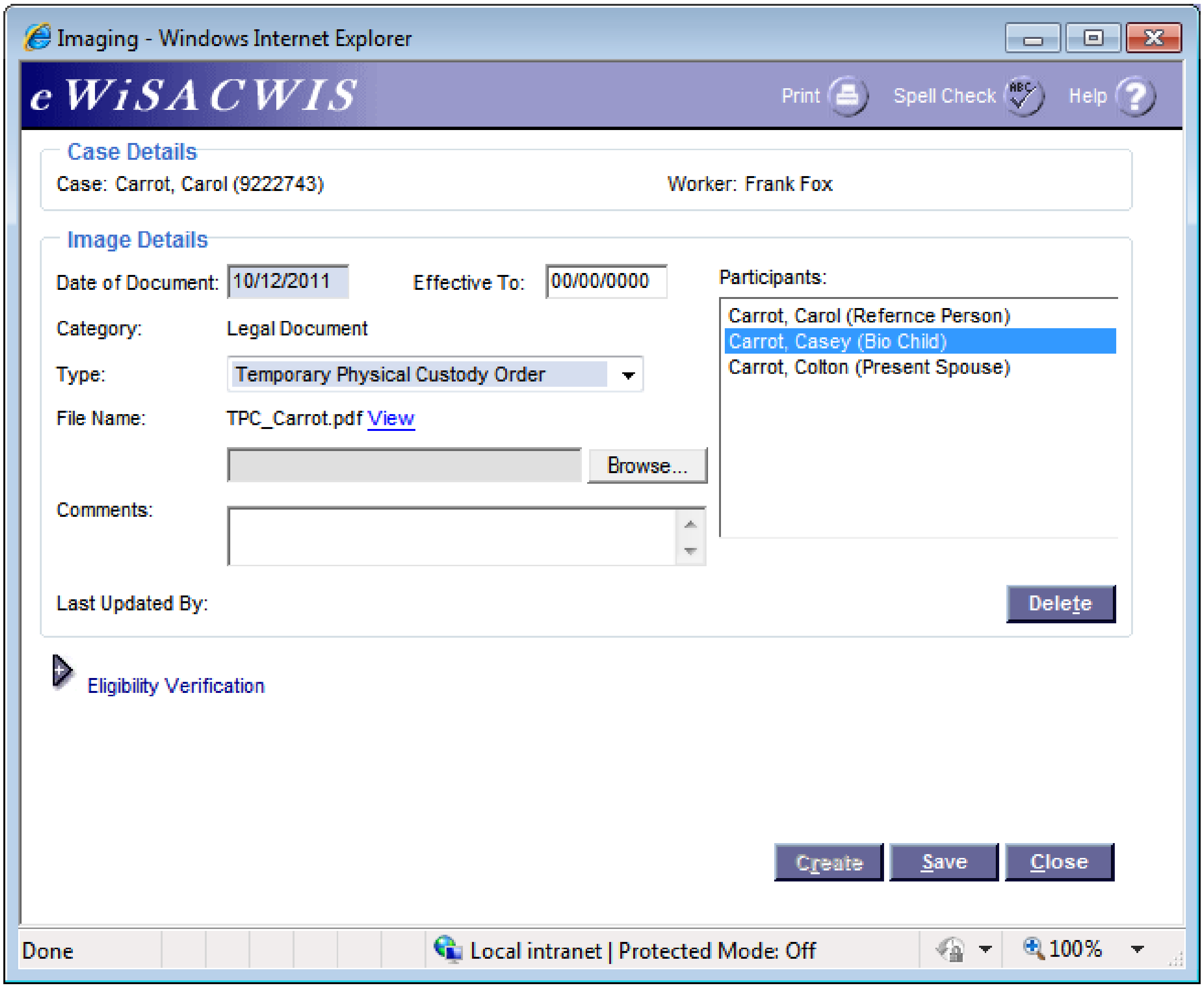
8. To attach a previously scanned document, select the Browse button. This will open the Choose File to Upload pop-up.

9. Select the scanned file from the appropriate location/folder. Once the file is selected, click the Open button.



Note: Files must contain the following extensions in order to be attached: bmp, jpg, jpeg, rtf, doc, docx, xls, xlsx, tiff, tif, and pdf and cannot exceed 10 MB.

10. Prior to saving the Imaging page, you can view the document by selecting the View hyperlink next to the File Name.



11. Enter any comments in the Comments field.

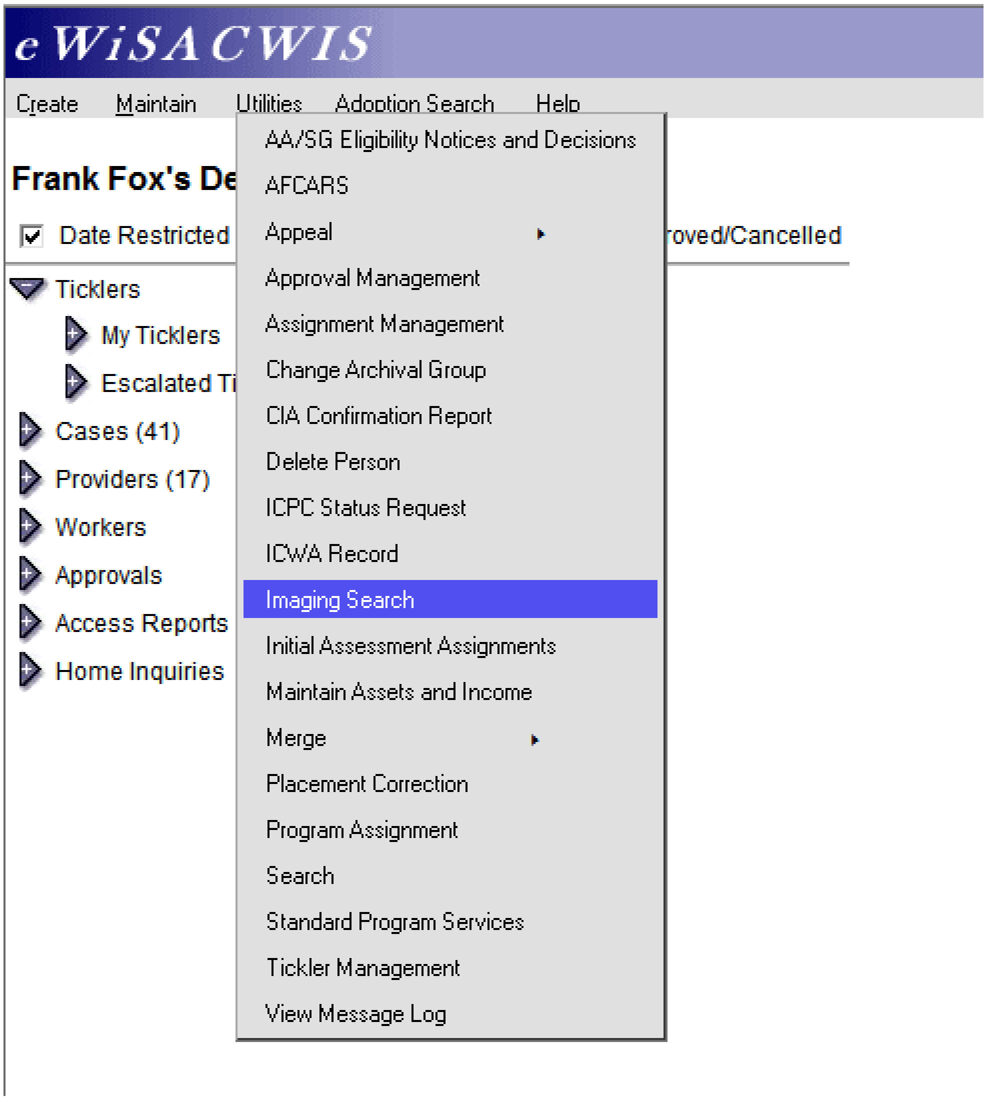
12. When all required fields have been completed, click Save.

13. At this point, you can delete the document if you added it in error to the wrong case by clicking the Delete button. If you added it to the wrong participant in this case, you can update the Participants box to select the correct participant(s).

14. You can also create new images for this case by selecting the Create button and following steps 5-11.

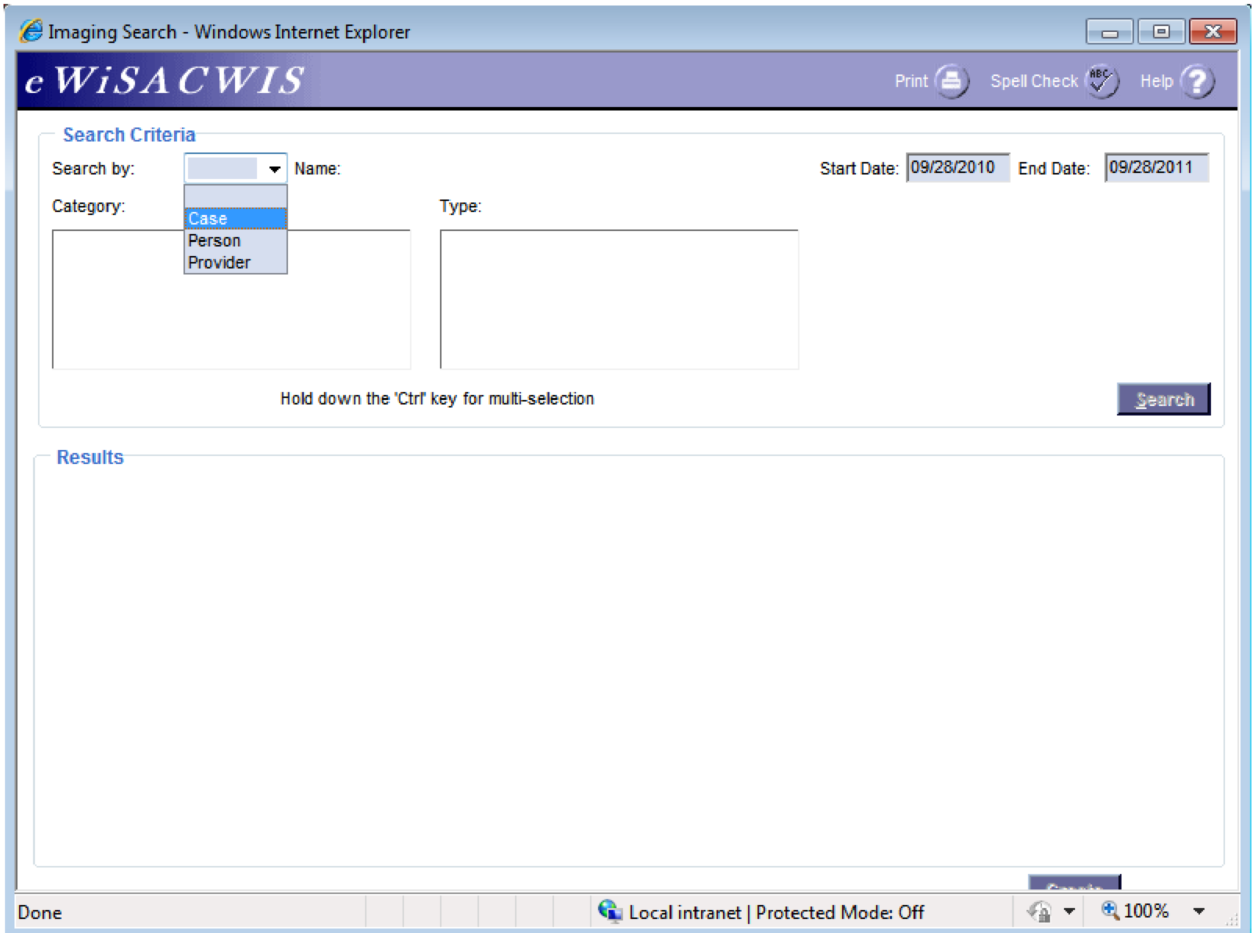
If you do not have an assignment to the case:

1. From the desktop, click Utilities > Imaging Search. This will open the Imaging Search page.

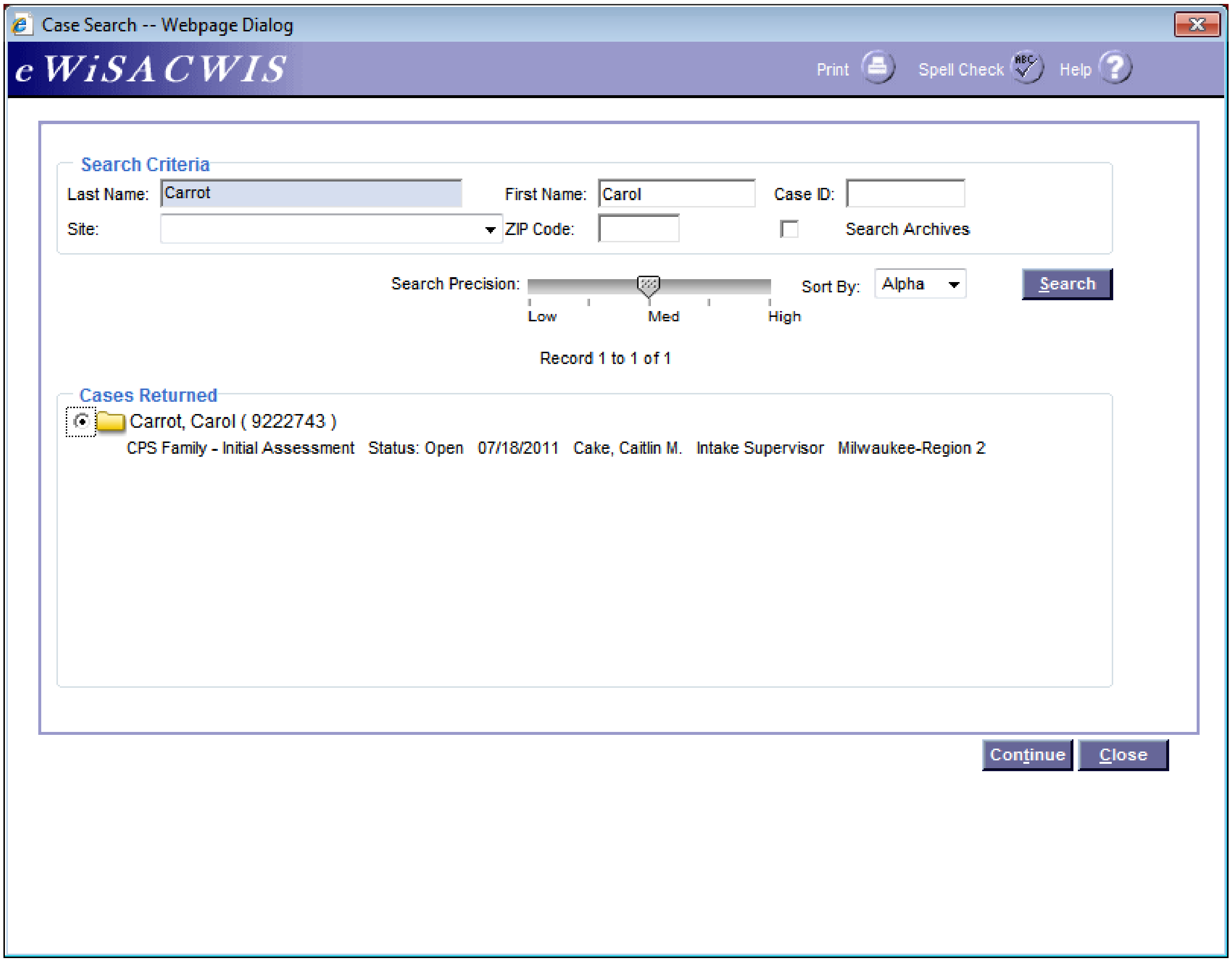


2. On the Imaging Search page, select Case in the Search by drop-down. This will open the Case Search page.

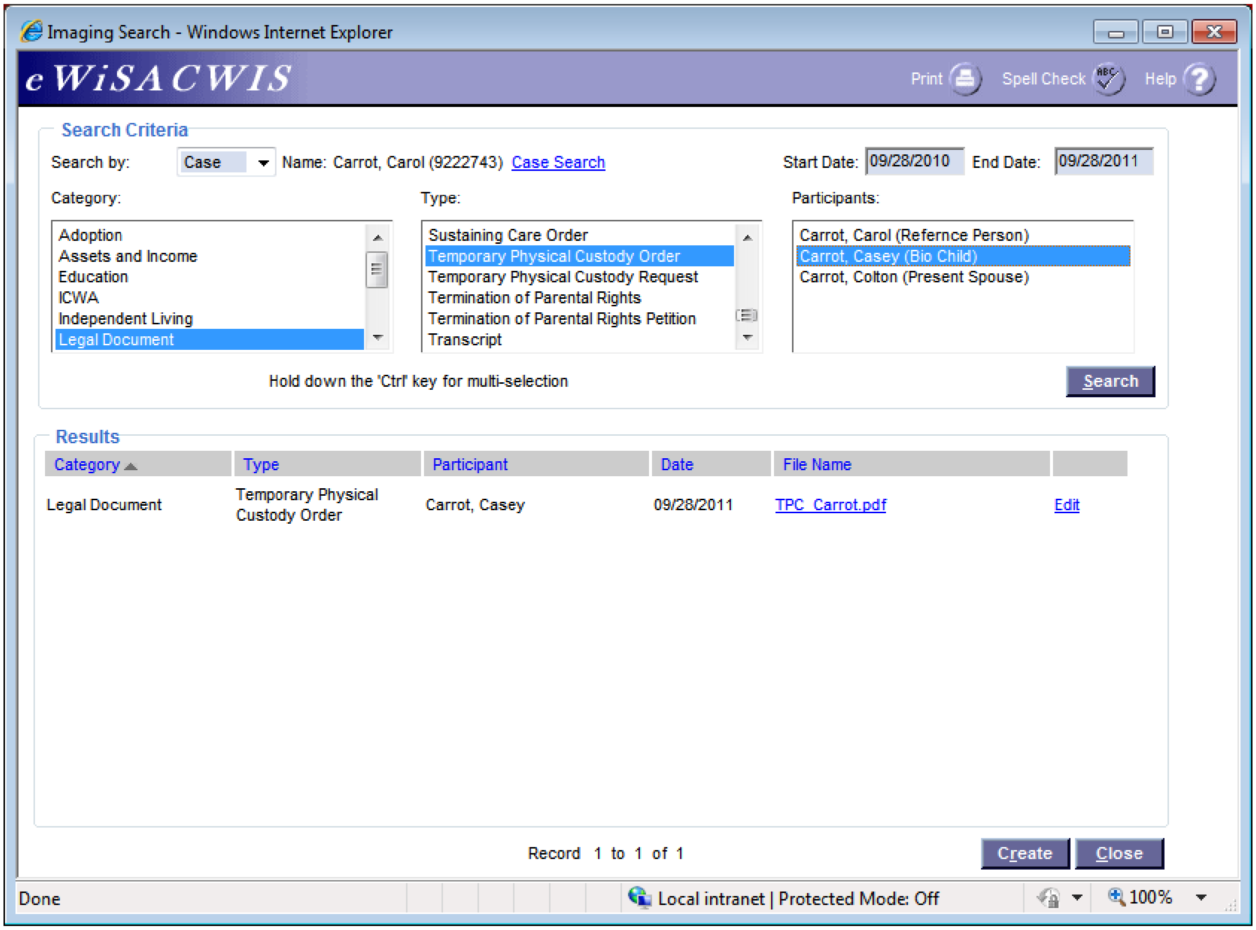
   Note: Please see the Person Imaging and Provider Imaging Quick Reference Guides to search by Person or Provider.



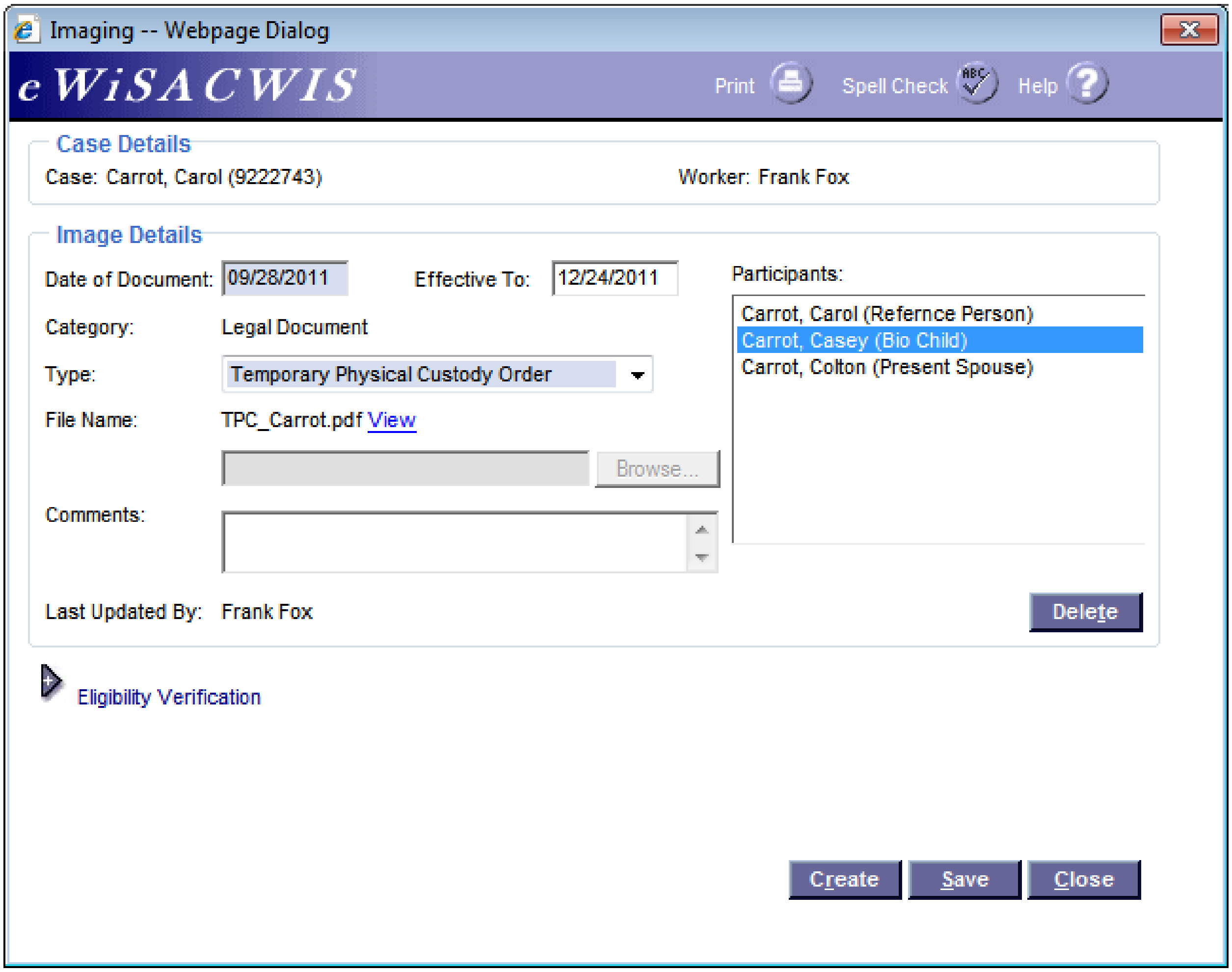
3. On the Case Search page, enter the case name or case ID to conduct your search and click Search. In the Cases Returned group box, select the radio button next to the correct case and click the Continue button.



4. This will bring you back to the Imaging Search page. The page will now display all documents for the case for all case participants from the past year. To add a document, select the Category and Type of document. You may also choose a participant(s). Click Create.



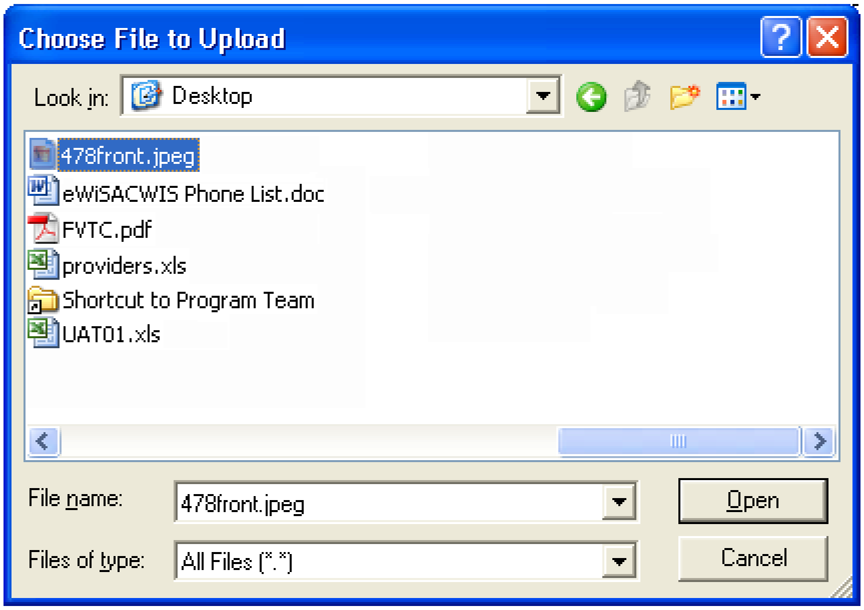
5. On the Imaging page, enter the Date of Document and an Effective To date, if applicable.



6. If you have not already done so, select the participant you would like the document attached to. You can multi-select participants by holding the control (ctrl) button while clicking on the name, if applicable.

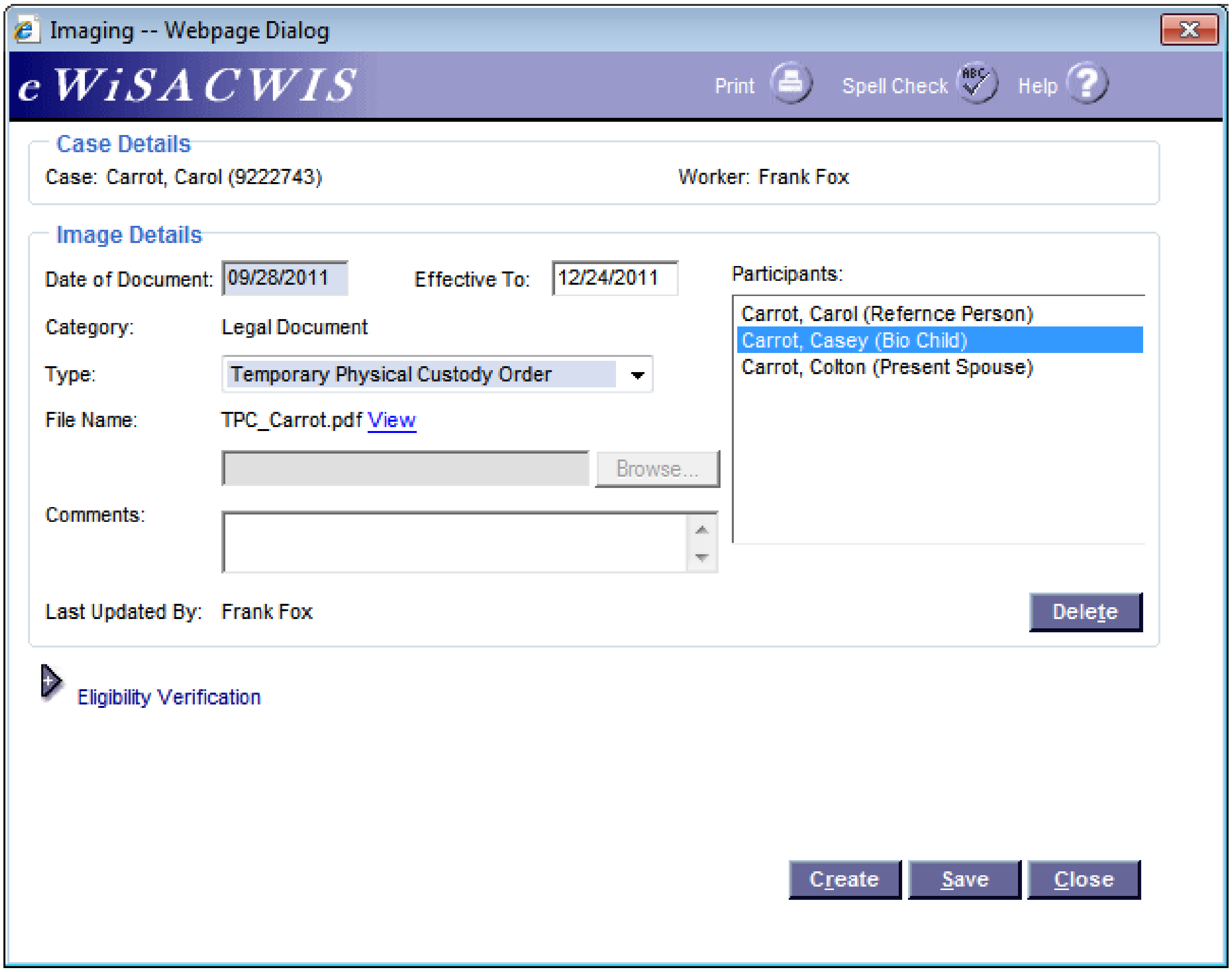
7. To attach a previously scanned document, select the Browse button. This will open the Choose File to Upload pop-up.

8. Select the scanned file from the appropriate location/folder. Once the file is selected, click the Open button.



Note: Files must contain the following extensions in order to be attached: bmp, jpg, jpeg, rtf, doc, docx, xls, xlsx, tiff, tif, and pdf and cannot exceed 10 MB.

9. Prior to saving the Imaging page, you can view the document by selecting the View hyperlink next to the File Name.



10. Enter any comments in the Comments field.

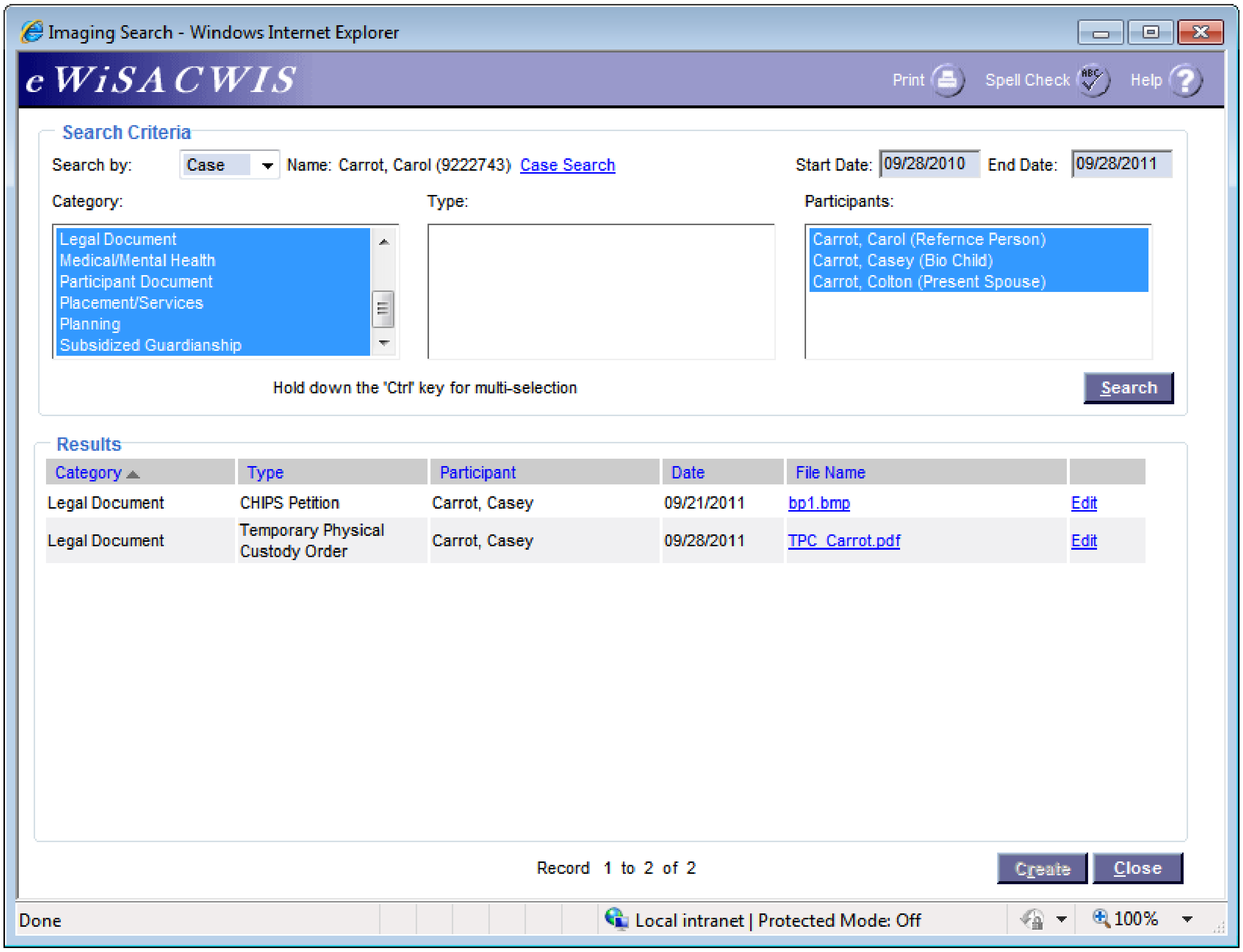
11. When all required fields have been completed, click Save.

12. At this point, you can delete the document if you created it in error (added it to the wrong case) by clicking the Delete button. If you added the document for the wrong participant in this case, you can update the Imaging page by correctly selecting the appropriate participant(s).

13. You can also create new images for this case by selecting the Create button and following steps 5-11.

14. Click Close. This will return you to the Imaging Search page.

15. The Imaging Search page will display all documents for the category and type you selected, based on the Start Date and End Date (the default is the past year). To view the image for a particular result, click on the blue hyperlink in the File Name column to access the scanned document directly, or click the Edit hyperlink to access the associated Imaging page.



16. You can also view the documents you just added via the desktop or the Search page. Expand the icon in which the document is attached to. You will see the Images icon with the number of images for that category of document listed. Expand the Images icon to retrieve the document you are looking for.